



TELECOMMUNICATIONS MARKET SNAPSHOT: COLOMBIA

Key Statistics

Population	44,725,543 (July 2010 est.)
GDP	\$431.9 billion (2010 est.)
Per capita GDP	\$9,800 (2010 est.)
Main lines	7.5 million (2009)
Teledensity	15% (2009)
Mobile subscribers	41.36 million (2008 est.)
Mobile penetration	90% (2009)
Internet users	22.538 million (2009)
Internet penetration	38% (2008)
Broadband subscribers	2.4 million (2010)
Spending on telecom equipment and services	\$7.23 billion (2010 est.)
U.S. equipment exports to market	\$248.59 million (2010 est.)

Sources: CIA World Factbook, USITC, WB, Worldwide Black Book, and BMI

Market Overview

Colombia's mobile market provides the best opportunities for growth in the telecom industry. Comcel (a subsidiary of América Móvil) dominates with about 66% of the market, followed by Movistar with 22%, and Tigo (owned by Millicom International Cellular) with 11%. All three operators have been offering 3G services since 2008. MNVOs have also been present in the market since 2010. Municipal telecoms operator Une-EPM currently owns a 25% stake in Tigo, but after its recent acquisition of 50MHz of spectrum in the 2.5GHz band, it is predicted that the company will become an independent operator which will launch LTE technology.

Activity in the broadband market is concentrated in major cities, such as Bogotá and Medellín, and an increasing interest in mobile broadband options is driving this market. In January of 2011, the government announced that it would raise the maximum spectrum per operator in the 1900MHz bandwidth from 55 to 60MHz to encourage the expansion of internet access. The four major players are Une-EPM, Telmex Hogar, Telefónica Telecom and ETB, which account for more than 80% of the market.

The fixed-line market, which has been in decline, is served by ETB with 1.97 million subscribers in 2010, followed by Colombia Telecomunicaciones with 1.707 million, EPM with 1.495 million as well as EmCali Telmex with less than 500,000 subscribers each.

Telecom Trade Agreements

WTO

Colombia has made commitments covering both basic and value-added telecom services in the World Trade Organization (WTO). For a list of the country's commitments, go to http://www.wto.org/english/tratop_e/serv_e/telecom_e/telecom_commit_exempt_list_e.htm. Colombia is not a signatory to the WTO Information Technology Agreement, which completely eliminates duties on a variety of info-communications technology products by January 2000.

Leading Service Providers

Comcel

www.comcel.com.co/

Empresa de Telecom de Bogotá (ETB)

<http://www.etb.com.co/>

Movistar

<http://www.movistar.com.co/>

Telefónica Telecom

<http://www.telefonica.com.co/>

Telmex Hogar

<http://www.telmex.com.co/>

Tigo

<http://www.tigo.com.co/>

Une-EPM

<http://www.une.com.co/>

Contacts

Regulatory

La Comisión de Regulación de Comunicaciones (CRC)

www.crcom.gov.co/

Ministerio de Tecnologías de la Información y las Comunicaciones (MinTIC)

<http://www.mintic.gov.co/>

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